



HOW TO GIVE TO

*The Preservation League's **Empire Legacy Circle** and create a lasting legacy of your own.*

Bequests and other types of planned gifts are a cornerstone of the Preservation League's preservation efforts and education programs across New York State and are essential to the present and the future of the League. They help ensure our ability to respond to future challenges while enabling us to expand our vision for historic preservation in New York State. Planning a gift to the Preservation League through your estate is a powerful declaration of your support.

There are several ways you can make a planned gift to the Preservation League:

Bequests – You can designate the Preservation League to receive a specific dollar amount or a percentage of your estate. A bequest can be done under your will or in your revocable trust. A bequest is simple to arrange, reduces your taxable estate, and allows you to retain your assets throughout your lifetime.

Charitable Lead Trusts – You can direct that the Preservation League receive an income stream from assets you contribute to a trust. After a period of years that you specify, the League's stream of payments comes to an end and the trust assets come back to your family, ordinarily at a reduced gift or estate tax cost.

Charitable Remainder Trusts – You can transfer assets to a trust for the Preservation League that pays you an income stream based on the value of the trust assets, usually for your lifetime. At the end of your stream of payments, the remainder passes to the Preservation League. Charitable remainder trusts can be especially appealing to donors with highly appreciated assets that they would like to liquidate without incurring a large tax bill when the assets are sold.

Retirement Accounts – You can designate the Preservation League as the beneficiary of any funds remaining in your pension or individual retirement accounts.

This material has been prepared for informational purposes only, and it is not intended to provide, and should not be relied upon, for tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before engaging in any transaction.

If you have questions or need more information, please contact Britt Densmore, Director of Development, at (508) 462-5658 x19 or bdensmore@preservenys.org. The Preservation League of New York State is a 501(c)(3) nonprofit corporation and gifts to the Preservation league are tax-deductible as allowed by law.

Legal Designation for the Preservation League

Preservation League of New York State, a nonprofit New York corporation with business address of:
44 Central Avenue, Albany, New York 12206



Confidential Reply Form

I want to join the *Empire Legacy Circle*.

Yes, I have made a provision for the Preservation League in my estate plans and would like to become a Charter Member of the *Empire Legacy Circle*.

If you answered yes, do you we have your permission to list you in our materials as a member of the *Empire Legacy Circle*?

Yes, please list my name as member of the *Empire Legacy Circle*.

No, I prefer to be anonymous.

I am considering including the Preservation League in my estate plans and would like information on how I can do this.

Name (Please print as you wish to be listed)

Address

City State Zip

Email Telephone

The Preservation League of New York State established the *Empire Legacy Circle* to recognize those supporters who have included the League in their estate plans. If your estate plans include a bequest to the Preservation League, a designation of the Preservation League to receive your IRA, or a charitable remainder trust or charitable lead trust that benefits the Preservation League, we invite you to consider joining this singular group.

For more information on ways to include the Preservation League in your estate plans please contact Britt Densmore, Director of Development at bdensmore@preservenys.org or (518) 462-5658 x19.

SAMPLE LANGUAGE
FOR BEQUESTS TO
PRESERVATION LEAGUE OF NEW YORK STATE*

BEQUEST OF A FIXED DOLLAR AMOUNT

I give and bequeath the sum of _____ Dollars (\$_____) to
PRESERVATION LEAGUE OF NEW YORK STATE, Albany, New York, for its
general purposes.

BEQUEST OF THE ENTIRE RESIDUARY ESTATE

(after all other bequests of property and fixed dollar amounts)

I give and bequeath all property or interests in property which shall be subject to
disposition by this will and which shall not have been effectively disposed of
pursuant to the other provisions of this will, of whatever nature and wherever
situated, to PRESERVATION LEAGUE OF NEW YORK STATE, Albany,
New York, for its general purposes.

* These are sample clauses for a will. Similar provisions could be used in a revocable lifetime trust. These clauses are provided for informational purposes only and do not constitute the provision of legal advice. Individual circumstances may warrant the use of language different from or in addition to this language. A will or a revocable lifetime trust should be prepared by a qualified attorney.